



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

(1) First Account and Report of Successor Trustee and (2) Petition for Allowance of Trustee Fees and Attorney Fees

Age: 16 years DOB: 7/21/1996		MARK E. OLSON , successor Trustee (Private Professional Fiduciary), is Petitioner. Account period: 07/31/10 – 07/31/12 Accounting - \$463,686.15 Beginning POH - \$299,055.65 Ending POH - \$324,340.49 Trustee - \$8,911.00 (\$7,799.00 has already been paid per Court order allowing compensation at \$350.00/month. Trustee requests approval for the remaining unpaid portion of \$511.00) Attorney - \$5,112.86 (per itemization and declaration for total fees in the amount of \$4,962.50 consisting of 18.9 hours broken down at .50 hr. @ \$175.00/hr., 7.30 hr. @ \$200.00/hr., 9.40 hr. @ \$300.00/hr., and 1.70 hr. @ \$350.00/hr. plus costs in the amount of \$150.36 for postage, photocopies and faxes)	NEEDS/PROBLEMS/COMMENTS: 1. Property on hand shows that the trust owns a 2008 Ford Econoline E-250 Van. Automobile Expense shows varying monthly charges from 11/11 – 05/12 for a total of \$16,830.60 for "Van Rental". It is unclear why the trust rented a van when it owned a van. The Court may require more information. 2. Schedule C-2 shows a disbursement to Sawyer Air Conditioning for \$10,900.00 for a HEPA unit for the house, however this item is not shown as an asset of the Trust on the Property on Hand schedule. The Court may require more information regarding this item. 3. Petitioner is requesting total compensation of \$8,911.00 for the accounting period based on the Court's previous order authorizing \$350/month to the Trustee. Based on the \$350/month the compensation to the Trustee for the 24 month accounting period would be \$8,400.00 not \$8,911.00. Further Schedule C-3 of the accounting reflects disbursements to Mark Olson in varying amounts rather than even monthly payments of \$350.00. The Court may require more information. 4. Schedule C-5 reflects reimbursements to Rafael Bustos for various amounts for mileage, vacation expenses, mariachi, 15 th birthday party, clothing, outings, etc. The Court may require more information regarding these reimbursements. 5. Attorney's request for fees and costs includes costs in the amount of \$150.36 for postage, photocopies and faxes; however, these costs are considered by the Court as part of the cost of doing business pursuant to Local Rule 7.17B.	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order	Petitioner prays for an Order: 1. Settling and allowing the first account as filed; 2. Ratifying, confirming, and approving all of the acts and transactions of Petitioner as trustee; 3. Allowing reasonable compensation to Petitioner for ordinary services rendered as trustee, in the total amount of \$8,911.00 for the period 07/31/10 – 07/31/12, of which \$511.00 remains unpaid to Petitioner; and 4. Authorizing and directing trustee to pay Robert T. Haden Professional Corporation, the sum of \$5,112.86 from the trust estate as fees for services rendered from 09/01/10 – 11/20/12.		
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

Atty Kruthers, Heather H., of County Counsel's Office (for Petitioner Public Guardian)

(1) Twelfth and Final Account and Report of Successor Conservator; (2) Petition for Allowance of Compensation to Successor Conservator and Attorney; (3) and Termination of Conservatorship of the Estate [Prob. C. 1861; 2620; 2623; 2630; 2942]

Age: 60 years		PUBLIC GUARDIAN , Successor Conservator of the Person and Estate, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 11/1/2010 – 10/19/2012	1. <i>Petition</i> does not indicate a disposition for the cash estate asset consisting of Pooled Pre-Need CD valued at \$1,500.84 following termination of the conservatorship estate.
Cont. from		Accounting - \$47,721.76	2. <i>Petition</i> does not indicate a plan for nor request distribution to the Conservatee of the non-cash estate asset consisting of bedroom furniture valued at \$651.89 following termination of the conservatorship estate.
Aff.Sub.Wit.		Beginning POH - \$32,979.83	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$ 1,913.66 (\$1,261.77 is cash)	Note: Proof of Service by Mail filed 1/2/2013 shows notice was sent to three half-siblings of the Conservatee, but was not sent to PATSY PICHARDO , step-sister, mentioned in the <i>CI Report</i> filed 2/9/2011. Court may require notice to be sent to this step-sister of the Conservatee.
	Inventory	Conservator - \$2,642.56 (14.86 Deputy hours @ \$96/hr and 16.00 Staff hours @ \$76/hr)	
	PTC	Attorney - \$1,250.00 (less than \$2,500.00 per Local Rule)	Reviewed by: LEG
	Not.Cred.	Bond fee - \$50.00 (OK)	
<input checked="" type="checkbox"/>	Notice of Hrg	Petitioner requests:	Reviewed on: 1/24/13
<input checked="" type="checkbox"/>	Aff.Mail W /	<ul style="list-style-type: none"> The Conservatorship of the Estate be terminated, as it is no longer necessary based upon the fact that during the period of accounting, the estate's investment account became depleted, and the Conservatee was placed on Medi-Cal; and Due to the insufficiency of the estate, a lien be imposed against the estate for any unpaid balance of authorized fees and commissions. 	Updates:
	Aff.Pub.		Recommendation:
	Sp.Ntc.		File 2 - Moreno
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/S		
	Objections		
	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
	9202		
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

~Please see additional page~

Petitioner prays for an Order:

1. Finding there is no longer a need for conservatorship of the estate;
2. Terminating conservatorship of the estate;
3. Approving, allowing and settling the Twelfth and Final Account;
4. Authorizing the conservator and attorney fees and commissions;
5. Authorizing payment of the bond fee.

Court Investigator Jo Ann Morris's Report was filed on 2/9/2011.

(1) Third Account and Report of Conservator of the Estate and (2) Petition for Allowance of Attorney Fees

Age: 59 years		JOHN COLFER , Conservator/spouse, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Based on the property on hand and income for one year, bond should be increased to \$97,898.00 2. Need care facility statements pursuant to Probate Code §2620(c)(5) 3. Disbursement schedule shows payments of \$1,219.25 for bedroom furniture however bedroom furniture is not listed on the property on hand schedule. 4. Disbursement schedule shows payments for "repair of Marketta's car" and other disbursements for auto related expenses however there is no automobiles listed on the property on hand schedule. <u>Note:</u> If the petition is granted, status hearings will be set as follows: • Friday, January 9, 2015 at 9:00 a.m. in Department 303, for the filing of the fourth account. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required. Reviewed by: KT Reviewed on: 1/24/13 Updates: Recommendation: File 3 - Erwin
		Account period: 8/1/10 – 10/31/12	
Cont. from		Accounting - \$292,006.31	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH- \$253,909.02	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$253,003.52	
<input type="checkbox"/>	Inventory	Conservator - not requested	
<input type="checkbox"/>	PTC	Attorney - \$2,500.00	
<input type="checkbox"/>	Not.Cred.	(per Local Rule)	
<input checked="" type="checkbox"/>	Notice of Hrg	Current bond is \$85,000.00	
<input checked="" type="checkbox"/>	Aff.Mail	Petitioner states upon his appointment as conservator of the estate, Petitioner agreed to contribute ¼ of the family's living expenses, not to exceed \$1,000.00 while ¾ of the family's living expenses were paid from the income and assets of the conservatee. At the end of the second accounting the Petitioner was on disability due to a work related injury. Then because of the poor economy he worked only sporadically. The conservator paid expenses as he was able during the account period. However, the conservatorship paid some of the expenses Mr. Colfer had been previously paying. Mr. Colfer now has a full-time, long term employment and intends to resume his contributions from his own salary.	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	2620(c)	X	
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Petitioner prays for an Order: 1. Approving, allowing and settling the third account. 2. Authorizing the attorney fees Court Investigator JoAnn Morris' Report filed on 10/11/12	

(1) Eleventh Account Current and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator and Attorney [Prob. C. 2620; 2623; 2942]

Age: 45 years	PUBLIC GUARDIAN , Conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 11/1/11 – 10/31/12	Note: If the petition is granted, status hearings will be set as follows:
Cont. from	Accounting - \$1,652,410.14	<ul style="list-style-type: none"> Friday, January 3, 2014 at 9:00 a.m. in Department 303, for the filing of the fourth account.
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH- \$1,577,110.15	
<input checked="" type="checkbox"/> Verified	Ending POH - \$1,501,767.04	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC	Conservator - \$3,050.52	
<input type="checkbox"/> Not.Cred.	(6.96 Deputy hours @ \$96/hr and 8.80 Staff hours @ \$76/hr)	Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.
<input checked="" type="checkbox"/> Notice of Hrg	Attorney - \$1,250.00	
<input checked="" type="checkbox"/> Aff.Mail	(per Local Rule)	
<input type="checkbox"/> Aff.Pub.	Bond fee - \$3,929.42	
<input type="checkbox"/> Sp.Ntc.	(o.k.)	
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen	Petitioner prays for an Order:	
<input type="checkbox"/> Letters	3. Approving, allowing and settling the eleventh account.	
<input type="checkbox"/> Duties/Supp	4. Authorizing the conservator and attorney fees and commissions	
<input type="checkbox"/> Objections	5. Payment of the bond fee	
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202	Court Investigator JoAnn Morris' Report filed on 6/13/12.	
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		Reviewed by: KT
<input type="checkbox"/> Status Rpt		Reviewed on: 1/24/13
<input type="checkbox"/> UCCJEA		Updates:
<input type="checkbox"/> Citation		Recommendation:
<input type="checkbox"/> FTB Notice		File 4 - Lopez

(1) Third Account Current and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator and Attorney [Prob. C. 2620; 2623; 2640; 2942]

Age: 74 years		PUBLIC GUARDIAN , Conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 10/26/10 – 10/25/12	<p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Friday, January 9, 2015 at 9:00 a.m. in Department 303, for the filing of the fourth account. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p> <p>Court Investigator's biennial review was due September 2012.</p>
		Accounting - \$87,473.93	
Cont. from		Beginning POH - \$29,332.26	
<input type="checkbox"/>	Aff.Sub.Wit.	Ending POH - \$12,061.06	
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory	Conservator - \$1,336.96	
<input type="checkbox"/>	PTC	(6.96 Deputy hours @ \$96/hr and 8.80 Staff hours @ \$76/hr)	
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Attorney - \$2,500.00	
<input checked="" type="checkbox"/>	Aff.Mail	(per Local Rule)	
<input type="checkbox"/>	Aff.Pub.	Bond fee - \$203.50	
<input type="checkbox"/>	Sp.Ntc.	(o.k.)	
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen	Petitioner prays for an Order:	
<input type="checkbox"/>	Letters	6. Approving, allowing and settling the third account.	
<input type="checkbox"/>	Duties/Supp	7. Authorizing the conservator and attorney fees and commissions	
<input type="checkbox"/>	Objections	8. Payment of the bond fee	
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 1/14/13
			Updates:
			Recommendation:
			File 5 - Barquet

(1) Second and Final Account and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator And Attorney

DOD: 8/23/12		PUBLIC GUARDIAN , Conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 8/28/08 – 8/23/12	
Cont. from		Accounting - \$24,729.67	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$ 361.42	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$ 208.67	
<input type="checkbox"/>	Inventory	Subsequent account period: 8/24/12 – 10/28/12	
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Accounting - \$2,288.67	
<input checked="" type="checkbox"/>	Aff.Mail	Beginning POH - \$ 208.67	
		Ending POH - \$ 278.67	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.	Conservator - \$3,125.20	
<input type="checkbox"/>	Pers.Serv.	(26.30 Deputy hours @ \$96/hr and 7.90 Staff hours @ \$76/hr)	
<input type="checkbox"/>	Conf. Screen	Attorney - \$1,250.00	
<input type="checkbox"/>	Letters	(less than allowed per Local Rule)	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections	Bond fee - \$50.00	
<input type="checkbox"/>	Video Receipt	(o.k.)	
<input type="checkbox"/>	CI Report	Petitioner request that due to the insufficiency of the estate to pay the fees and commissions that a lien be imposed upon the estate for any unpaid balances of the authorized fees and commissions.	
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
Petitioner prays for an Order:			Reviewed by: KT
9. Approving, allowing and settling the second and final account.			Reviewed on: 1/24/13
10. Authorizing the conservator and attorney fees and commissions			Updates:
11. Payment of the bond fee			Recommendation:
12. Authorize petitioner to impose a lien on the estate for any unpaid balances of authorized fees and commissions			File 6 - Elerick

(1) Second and Final Account and Report of Conservator; (2) Petition for Allowance of Compensation to Conservator and Attorney [Prob. C. 1860; 2620; 2623; 2630; 2942]

DOD: 9/16/2012		PUBLIC GUARDIAN , Conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 4/3/09 – 9/16/12	1. Records show that this conservatorship has an outstanding balance due of \$766.00 for court investigation fees incurred on 5/1/2008.
		Accounting - \$41,543.13	
		Beginning POH - \$ 2,973.93	
		Ending POH - \$ 2,879.16	
Cont. from		Subsequent account period: 9/17/12-10/15/12	
<input type="checkbox"/>	Aff.Sub.Wit.	Accounting - \$4,948.88	
<input checked="" type="checkbox"/>	Verified	Beginning POH - \$2,879.16	
<input type="checkbox"/>	Inventory	Ending POH - \$3,491.95	
<input type="checkbox"/>	PTC	Conservator - \$2,506.16	
<input type="checkbox"/>	Not.Cred.	(17.16 Deputy hours @ \$96/hr and 11.30 Staff hours @ \$76/hr)	
<input checked="" type="checkbox"/>	Notice of Hrg	Attorney - \$1,250.00 (less than allowed per Local Rule)	
<input checked="" type="checkbox"/>	Aff.Mail	Bond fee - \$87.50 (o.k.)	
<input type="checkbox"/>	Aff.Pub.	Petitioner request that due to the insufficiency of the estate to pay the fees and commissions that a lien be imposed upon the estate for any unpaid balances of the authorized fees and commissions.	
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order	Petitioner prays for an Order:	
<input type="checkbox"/>	Aff. Posting	13. Approving, allowing and settling the second and final account.	
<input type="checkbox"/>	Status Rpt	14. Authorizing the conservator and attorney fees and commissions	
<input type="checkbox"/>	UCCJEA	15. Payment of the bond fee	
<input type="checkbox"/>	Citation	16. Authorize petitioner to impose a lien on the estate for any unpaid balances of authorized fees and commissions	
<input type="checkbox"/>	FTB Notice		

Reviewed by: KT

Reviewed on: 1/14/13

Updates:

Recommendation:

File 7 - Donovan

First Account Current and Report of Trustee; Petition for Allowance of Compensation to Trustee and Attorney

Age: 35		PUBLIC GUARDIAN , Successor Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
DOB: 3-17-77			
<input type="checkbox"/>	Aff.Sub.Wit.	Account period: 8-3-11 through 8-2-12	<p>1. Petitioner states the residence was sold during this account period for no gain or loss. However, there does not appear to be prior court authorization for the sale. The special needs trust is subject to the requirements of a conservatorship estate pursuant to Cal. Rules of Court 7.903 and Trust Article V, Section I.</p> <p>2. It does not appear that authorization for payment of the bond fee is included in the prayer or the order.</p>
<input checked="" type="checkbox"/>	Verified	Accounting: \$ 201,502.84	
<input type="checkbox"/>	Inventory	Beginning POH: \$ 0.00	
<input type="checkbox"/>	PTC	Ending POH: \$ 178,772.64 (cash)	
<input type="checkbox"/>	Not.Cred.	Trustee: \$3,872.20 (for 17.38 Deputy hours @ \$96/hr and 26.47 Staff hours @ \$2,011.72 including property issues / code enforcement / sale, etc. Per declaration.)	
<input checked="" type="checkbox"/>	Notice of Hrg	Attorney: \$2,500.00 (per local rule)	
<input checked="" type="checkbox"/>	Aff.Mail	Bond fee: \$446.94 (ok)	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen	Petitioner prays for an order:	<p>1. Approving, allowing and settling the account and report of trustee;</p> <p>2. Authorizing the trustee and attorney compensation; and</p> <p>3. Any other orders the Court considers proper.</p>
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		Reviewed by: skc
<input type="checkbox"/>	Citation		Reviewed on: 1-25-13
<input type="checkbox"/>	FTB Notice		Updates:
			Recommendation:
			File 8 - Rossi

Atty Kruthers, Heather H. (for Public Guardian – Conservator/Petitioner)

(1) Second and Final Account and Report of Conservator; (2) Petition for Allowance of Compensation to Conservator and Attorney; and (3) Distribution [Prob. C. 1860; 2620; 2623; 2630; 2631; 2942]

DOD: 08/03/12		PUBLIC GUARDIAN , Conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 06/14/11 – 08/03/12	
Cont. from		Accounting - \$22,186.67	
	Aff.Sub.Wit.	Beginning POH - \$2,097.70	
✓	Verified	Ending POH - \$868.30	
	Inventory		
	PTC	Subsequent account period: 08/04/12 – 09/07/12	
	Not.Cred.	Accounting - \$4,927.72	
✓	Notice of Hrg	Beginning POH - \$868.30	
✓	Aff.Mail w/	Ending POH - \$4,927.72	
	Aff.Pub.	Conservator - \$1,276.72 (8.50 Staff hours @ \$76/hr. and 6.57 Deputy hours @ \$96/hr.)	
	Sp.Ntc.	Attorney - \$1,250.00 (per Local Rule)	
	Pers.Serv.	Bond Fee - \$25.00 (ok)	
	Conf. Screen	Petitioner states that the conservatee died intestate and survived by three children. However, after payment of the court-ordered fees and commissions, there will be no assets remaining for distribution. Any remaining property on hand will be distributed to the State of California, Department of Health Services, to reimburse for Medi-Cal.	
	Letters		Reviewed by: JF
	Duties/Supp		Reviewed on: 01/24/13
	Objections		Updates:
	Video Receipt		Recommendation:
	CI Report		File 9 - Hudson
	2620(c) n/a		
✓	Order	Petitioner prays for an Order:	
	Aff. Posting	1. Approving, allowing and settling the second and final account;	
	Status Rpt	2. Authorizing the conservator and attorney fees and commissions;	
	UCCJEA	3. Authorizing payment of the bond fee; and	
	Citation	4. Authorizing distribution of the balance of property on hand to the State of California.	
	FTB Notice		

DOD: 08/14/11		DAVID MICHAEL VALLA , Administrator, is Petitioner. Accounting is waived. I & A - \$190,000.00 POH - \$190,000.00 (real property) Administrator - waived Attorney - \$4,500.00 (less than statutory, to be paid by Petitioner outside of the estate) Distribution, pursuant to intestate succession, is to: David Michael Valla- real property valued at \$190,000.00	NEEDS/PROBLEMS/COMMENTS:				
Cont. from							
<input type="checkbox"/>	Aff.Sub.Wit.						
<input checked="" type="checkbox"/>	Verified						
<input checked="" type="checkbox"/>	Inventory						
<input checked="" type="checkbox"/>	PTC						
<input checked="" type="checkbox"/>	Not.Cred.						
<input checked="" type="checkbox"/>	Notice of Hrg						
<input checked="" type="checkbox"/>	Aff.Mail w/o						
<input type="checkbox"/>	Aff.Pub.						
<input type="checkbox"/>	Sp.Ntc.						
<input type="checkbox"/>	Pers.Serv.						
<input type="checkbox"/>	Conf. Screen						
<input type="checkbox"/>	Letters 04/17/12						
<input type="checkbox"/>	Duties/Supp						
<input type="checkbox"/>	Objections						
<input type="checkbox"/>	Video Receipt						
<input type="checkbox"/>	CI Report						
<input checked="" type="checkbox"/>	9202						
<input checked="" type="checkbox"/>	Order						
<input type="checkbox"/>	Aff. Posting						
<input type="checkbox"/>	Status Rpt						
<input type="checkbox"/>	UCCJEA						
<input type="checkbox"/>	Citation						
<input checked="" type="checkbox"/>	FTB Notice						
<table border="1"> <tr> <td>Reviewed by: JF</td> </tr> <tr> <td>Reviewed on: 01/24/13</td> </tr> <tr> <td>Updates:</td> </tr> <tr> <td>Recommendation: SUBMITTED</td> </tr> <tr> <td>File 10 - Valla</td> </tr> </table>			Reviewed by: JF	Reviewed on: 01/24/13	Updates:	Recommendation: SUBMITTED	File 10 - Valla
Reviewed by: JF							
Reviewed on: 01/24/13							
Updates:							
Recommendation: SUBMITTED							
File 10 - Valla							

Petition for Order Confirming Successor Trustee [Prob. C. 17200]

Goldie DOD: 04/20/98		DORETA RUTH WHITTEN, successor Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Arthur DOD: 03/25/11			
Cont. from 112812		Petitioner states: 1. The ARTHUR WILLIAM MYERS AND GOLDIE MAE MYERS JOINT REVOCABLE LIVING TRUST (the "Trust") was established under the laws of the State of Oregon on 09/14/95 with Arthur Myers & Goldie Myers as Trustors. 2. When the Trust was established, Trustors owned units of Franklin California Tax-Free Income Fund, Inc. – Class I ("Franklin Fund") where were listed on Schedule A as an asset of the Trust. The Franklin Fund was serviced through an account at World Savings Bank. During the course of administration, units of Franklin California Income Fund – Class A were added to the account. The account changed hands during the bank and brokerage mergers and currently both Franklin California Income Funds are held in an account with Chase Investment Services Corporation titled, "Arthur W. Myers, Trustee of the Arthur W. Myers and Goldie May Myers Bypass Trust." 3. Arthur Myers served as initial trustee and the Trustors' daughter, Petitioner Doreta Whitten, was designated to serve as successor trustee. Pursuant to section 1.7 of Article 1 of the Trust, either Trustor, acting alone, had the right to "exercise the rights of revocation, withdrawal, alteration, and amendment..." the Trust when either Trustor died or became incapacitated. 4. After the Trustors moved from Oregon to California, the Trust was restated by a California Attorney on 10/08/97 (the "Restated Trust"). Arthur Myers remained as the initial Trustee and Petitioner remained as successor Trustee. 5. On 04/20/98, Trustor Goldie Myers died and Arthur Myers continued to serve as Trustee.	CONTINUED FROM 11/28/12 Minute Order from 11/28/12 states: Counsel advises the Court that last night one of the intestate heirs contacted Attorney Joanne Sanoian. Counsel further advises that she believes there may be an objection. Counsel requests a continuance. As of 01/23/13, nothing further has been filed.
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
✓ Notice of Hrg			
✓ Aff.Mail	w/		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Continued on Page 2

6. After the death of Goldie Myers, Arthur Myers partially funded the sub-trusts created under the Restated Trust by transferring title on the Chase Investment Services Corporation ("Chase") account to Arthur W. Myers, Trustee of the Arthur W. Myers and Goldie May (sic) Myers Bypass Trust. This account is currently active. Petitioner states that the original Restated Trust was provided to Chase for copying at the time the account was transferred to the sub-trust.
7. Arthur Myers died on 03/25/11. After his death, Petitioner began serving as the sole successor trustee of the Trust and all sub-trusts established thereunder, including the Bypass Trust.
8. As part of her administration of the Trust, Petitioner submitted an Account Registration Change Request to Chase to request that her name be put on the account as successor Trustee. Chase rejected this request on the grounds that since the original Trust document did not use the term "Bypass Trust", the change would violate their internal policy without re-submission of the Restated Trust. (Chase is apparently unable to locate the copy of the Restated Trust provided to them by Mr. Myers).
9. After Mr. Myers death, Petitioner discovered that a portion of the original Restated Trust was missing from Mr. Myer's binder of original documents. After a diligent search, Petitioner has been unable to find the missing pages and has been unable to find a complete copy. The attorney who drafted the Restated Trust, Robert Zehner, has retired and the attorney who took over his filed, Ann Herring, has been unable to locate a copy due to a crash of the firm's computerized storage system. Ms. Herring has confirmed, however, that the appointment of Doreta Ruth Whitten as successor trustee was in effect at the Trustor's death. Without submission of the complete original Restated Trust, Chase will not put Petitioner on the account as successor trustee. Chase advised Petitioner that a court order would be required.

Petitioner prays for an Order:

1. Determining that Doreta Ruth Whitten is the Successor Trustee of the Arthur William Myers and Goldie Mae Myers Joint Revocable Living Trust and all sub-trusts established thereunder, including, without limitation, the Arthur W. Myers and Goldie Mae Myers Bypass Trust; and
2. Determining that Chase Investment Services Corporation account number xxx-x9207 (formerly account number xxx-xx4471) currently held in the name of Arthur W. Myers, Trustee of the Arthur W. Myers and Goldie May Myers Bypass Trust be transferred to Doreta Ruth Whitten, Successor Trustee of the Arthur W. Myers and Goldie Mae Myers Bypass Trust.

Atty Westcott, Marie (pro per – non-relative/Guardian)

Atty Vasquez, Natasha (pro per – mother/Petitioner)

Petition for Termination of Guardianship

Sable, 11		<p>NATASHA VASQUEZ, mother, is Petitioner.</p> <p>MARIE WESCOTT, non-relative, was appointed Guardian on 12/14/10. – <i>Served by mail on 12/08/12</i></p> <p>Father: KEITH CARTER</p> <p>Paternal grandfather: CHRISTOPHER CARTER Paternal grandmother: TAMERA COLLINSWORTH - deceased</p> <p>Maternal grandfather: JOSEPH VASQUEZ Maternal grandmother: SHELLY FULLERTON – <i>Served by mail on 12/08/12</i></p> <p>Sibling: DRACOS BECKER (12)</p> <p>Petitioner alleges that her requests to be involved with the children's schooling, therapy, doctor's visits, and regarding visitation have been ignored. She states that she going to school to be an RN, has her oldest son in her care and is able to provide for the children. She therefore requests that the guardianship be terminated.</p> <p>Court Investigator Dina Calvillo filed a report on 01/22/13.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need proof of service by mail of <i>Notice of Hearing</i> with a copy of the <i>Petition for Termination of Guardianship</i> at least 15 days before the hearing on:</p> <ul style="list-style-type: none"> - Keith Carter (father) - Christopher Carter (paternal grandfather) - Joseph Vasquez (maternal grandfather) - Dracos Becker (brother)
Killian, 7			
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w/		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: JF
Reviewed on: 01/24/13
Updates:
Recommendation:
File 12 - Carter

Jordan Age: 2		<p align="center">NO TEMPORARY REQUESTED</p> <p>RACHEL RAYENETTE RAMIREZ-RODRIGUEZ, maternal grandmother, is petitioner.</p> <p>Father: SALVADOR VILLA, Consents and Waives Notice</p> <p>Mother: JESSICA ALLEN, Consents and Waives Notice</p> <p>Paternal Grandfather: Roberto Villa, Deceased</p> <p>Paternal Grandmother: Pauline Rodriguez, Consents and Waives Notice</p> <p>Maternal Grandfather: Deceased</p> <p>Petitioner states: the parents are not stable, the mother is always relapsing and the father is not always around. Petitioner states the children need a stable and safe home.</p> <p>Court Investigator Samantha Henson's report filed 01/24/2013.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>This petition pertains only to Jordan Villa and Cindi Villa. Guardianship of Bernice Villa was granted on 01/03/2013 appointing the child's maternal aunt and her partner permanent guardians.</p> <p>1. UCCJEA does not provide the residence of the children since birth as required.</p>	
Cindi Age: 7 months				
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			n/a
	Aff.Mail			n/a
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			n/a
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
<p>Reviewed by: LV</p> <p>Reviewed on: 01/25/2013</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 13 - Villa</p>				

Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)

Age: 18		<u>NO TEMPORARY REQUESTED</u>		NEEDS/PROBLEMS/COMMENTS:	
		DIANA GARDUQUE , mother, is		Voting rights affected. Need minute order.	
		Petitioner and requests appointment		Court Investigator advised rights on	
		as Conservator of the Person with		01/15/13.	
		Medical Consent powers.		<ol style="list-style-type: none"> 1. The Capacity Declaration filed 12/07/12 is incomplete. Need completed capacity declaration. 2. The Petition is incomplete at item 11. The names, residence addresses, and relationships to the proposed conservatee of all second degree relatives (parents, grandparents, children, grandchildren, and siblings) are to be listed. 3. Need Citation and proof of personal service at least 15 days before the hearing of the <i>Citation</i> along with a <i>Notice of Hearing</i> and copy of the <i>Petition for Appointment of Probate Conservator</i> on the proposed conservatee. 4. Need Notice of Hearing. 5. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Probate Conservator</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: <ul style="list-style-type: none"> - All second degree relatives (to be listed in item 11 of the Petition) 6. Need receipt verifying that the Conservatorship video has been viewed by Petitioner. 7. Need Order. 	
Cont. from		Declaration of Lydia Favor, M.D. –			
<input type="checkbox"/>	Aff.Sub.Wit.	<input type="checkbox"/>	NEED COMPLETED DECLARATION		
<input checked="" type="checkbox"/>	Verified	<input type="checkbox"/>	Voting rights affected.		
<input type="checkbox"/>	Inventory	<input type="checkbox"/>	Petitioner states that the proposed conservatee was born with a seizure disorder and developmental delays and needs constant care.		
<input type="checkbox"/>	PTC	<input type="checkbox"/>	Conservatorship is necessary in order to make decisions on the conservatee's behalf.		
<input type="checkbox"/>	Not.Cred.	<input type="checkbox"/>	Court Investigator Jennifer Young		
<input type="checkbox"/>	Notice of Hrg	<input checked="" type="checkbox"/>	filed a report on 01/22/13.		
<input type="checkbox"/>	Aff.Mail	<input checked="" type="checkbox"/>			
<input type="checkbox"/>	Aff.Pub.	<input type="checkbox"/>			
<input type="checkbox"/>	Sp.Ntc.	<input type="checkbox"/>			
<input type="checkbox"/>	Pers.Serv.	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	Conf. Screen	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Letters	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Duties/Supp	<input type="checkbox"/>			
<input type="checkbox"/>	Objections	<input type="checkbox"/>			
<input type="checkbox"/>	Video Receipt	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	CI Report	<input type="checkbox"/>			
<input type="checkbox"/>	9202	<input type="checkbox"/>			
<input type="checkbox"/>	Order	<input checked="" type="checkbox"/>			
<input type="checkbox"/>	Aff. Posting	<input type="checkbox"/>		Reviewed by: JF	
<input type="checkbox"/>	Status Rpt	<input type="checkbox"/>		Reviewed on: 01/24/13	
<input type="checkbox"/>	UCCJEA	<input type="checkbox"/>		Updates:	
<input type="checkbox"/>	Citation	<input checked="" type="checkbox"/>		Recommendation:	
<input type="checkbox"/>	FTB Notice	<input type="checkbox"/>		File 15 - Garduque	

Petition for Appointment of Temporary Guardianship of the Person

Age: 16		<u>GENERAL HEARING 03/21/2013</u>		NEEDS/PROBLEMS/COMMENTS:	
		SOCORRO GONZALEZ , paternal grandmother, is petitioner.		1. Need Notice of Hearing.	
Cont. from		Father: CESAR MORENO		2. Need proof of personal service five (5) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:	
	Aff.Sub.Wit.	Mother: JEANETTE GUZMAN		<ul style="list-style-type: none"> • Cesar Moreno (Father) • Jeanette Guzman (Mother) • Cesar Moreno (Minor) • Samantha Moreno (Sibling) 	
✓	Verified	Paternal Grandfather: Unknown		3. Need Letters.	
	Inventory				
	PTC				
	Not.Cred.				
	Notice of Hrg	x	Maternal Grandfather: Juan Jose Magana		
	Aff.Mail		Maternal Grandmother: Graciela Magana		
	Aff.Pub.		Sibling: Samantha Moreno (14)		
	Sp.Ntc.		Petitioner states: that the child is currently residing with her. She states that the mother and the child have a volatile relationship and on several occasions there has been a physical altercation resulting in the child being sent to juvenile hall twice. The father is currently incarcerated for manslaughter and is awaiting sentencing. Petitioner alleges on 12/24/2012 the mother and child were arguing, the mother told the child to get into the car and the mother dropped the child off at a shelter and indicated if he came home she would send him to juvenile hall. The child went to the home of the petitioner and has been with her ever since. The petitioner states that the child is afraid to return to his mother's care and wishes to remain with the petitioner.		
	Pers.Serv.	x			
✓	Conf. Screen				
	Letters	x			
✓	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
	9202				
✓	Order				
	Aff. Posting			Reviewed by: LV	
	Status Rpt			Reviewed on: 01/25/2013	
✓	UCCJEA			Updates:	
	Citation			Recommendation:	
	FTB Notice			File 16 - Moreno	

(1) Seventh Account Current and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator and Attorney [Prob. C. 2620; 2623; 2630; 2942]

Age: 67		PUBLIC GUARDIAN , Conservator, is Petitioner. Account period: 11/01/10 – 10/31/12 Accounting - \$130,970.22 Beginning POH - \$44,440.19 Ending POH - \$53,728.94 Conservator - \$2,778.56 (21.20 Staff hours @ \$76/hr. and 12.16 Deputy hours @ \$96/hr.) Attorney - \$1,250.00 (Less than allowed per Local Rule) Bond Fee - \$339.40 (ok) Petitioner prays for an Order: <ol style="list-style-type: none"> 1. Authorizing, allowing and settling the seventh account; 2. Authorizing the conservator and attorney fees and commissions; and 3. Authorizing payment of the bond fee. Court Investigator Jennifer Daniel filed a report on 04/20/12.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 01/23/13</u>
Cont. from 012313			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w/		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	2620(c) n/a		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: JF Reviewed on: 01/24/13 Updates: Recommendation: File 18 - Leslie	